UNDERSTANDING REPORTING REQUIREMENTS AND COLLECTING DATA

Lara Malakoff, ICF

CED Grantee Conference

March 22, 2017

CED

Community Economic Development

Agenda

- Background on reporting
  - Process and timeline
- Forms and data elements
  - Form A
  - Form B
  - Form E
- Resources and support
- Questions

Timeline

Reporting Period	Reporting System Opens	Report Due Date
September 30 – March 31	April 1	April 30
April 1 – September 29	October 1	Oct. 30

- First reporting period for FY 2016 grantees: September 30, 2016 – March 31st 2017

- Online system opens: April 1, 2017

- Reports due: April 30, 2017

Overview of Forms

- Cover Page

- Form A: Performance Measures

- Form B: Program Indicators

- Form E: Activity Based Expenditures

Form A:

PERFORMANCE MEASURES

Columns

Appendix C: Performance Progress Report Form PERFORMANCE MEASURES SF-PPR FORM A						
1. Federal Agency and Organization Element to Which Report is Submitted **Office of Community Services**			2. Federal Grant or Other Identifying Number Assigned by Federal Agency		3a. DUNS - 3b. EIN	4. Reporting Period End Date 09/30/2005
A. Performance Measures						
(1) Indicator Number	**(2)** Objective/Goal	**(3)** Indicator	**(4)** Baseline	**(5)** Project Target	**(6)** Actual To Date	**(7)** Explanation
A-01-B	Create new businesses to employ low-income	Total # of new businesses created	✓	✓		

Reference:

1. Indicator Number

2. Objective/Goal

3. Indicator

Confirm:

4. Baseline

5. Project Target

Complete:

6. Actual to Date (cumulative)

7. Explanation

Column 2: Objectives/Goals

- Create new businesses to employ low-income individuals
- Expand existing businesses to employ low-income individuals
- Create positions to employ all individuals (low-income and non-low-income)
- Create positions to employ low-income individuals
- Create full-time positions with benefits for low-income individuals
- Prepare low-income individuals for employment
- Employ low-income individuals in positions created
- Create full-time positions for low-income individuals with opportunity for advancement
- Help low-income individuals retain new jobs
- Leverage additional funds to increase project success

Column 3: Indicators

Indicator Number	Objective / Goal	Indicator
A-01-B	Create new businesses to employ low-income individuals	Total # of new businesses created
A-02-B		# of new businesses that were created AT LEAST 12 months ago
A-03-B		# of new businesses created that have been or were operational in the community for AT LEAST 12 consecutive months

Column 4: Baseline

- Data from your last semi-annual PPR

- Prepopulated based on previous report field entry

- Cannot be edited

- Will be all zeroes for your first report
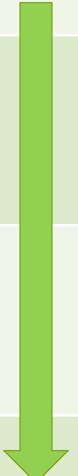
Column 5: Project Target

Indicator Number	Objective / Goal	Indicator	Project Target
A-01-B	Create new businesses to employ low-income individuals	Total # of new businesses created	
A-04-B	Expand existing businesses to employ low-income individuals	Total # of businesses expanded	
A-00-J	Create positions to employ all individuals (low-income and non-low-income)	Total # of full-time positions created for low-income and non-low-income individuals	
A-06-J	Create positions to employ low-income individuals	Total # of full-time positions created for low-income individuals	
A-13-E	Prepare low-income individuals for employment	Total # of low-income individuals trained in skills for the jobs created	
A-26-F	Leverage additional funds to increase project success	How many total dollars has your project leveraged?	

Column 6: Actual to Date

- Four indicator categories:

  - Businesses

  - Positions

  - Employees

  - Funding

- Cumulative from the beginning of the grant

Column 6: Actual to Date
Businesses & Positions

Indicator Number	Objective / Goal	Indicator	Actual to Date
A-01-B	Create new businesses to employ low-income individuals	Total # of new businesses created	**Cumulative over the course of your grant**
A-04-B	Expand existing businesses to employ low-income individuals	Total # of businesses expanded	
A-00-J	Create positions to employ all individuals (low-income and non-low-income)	Total # of full-time positions created for low-income and non-low-income individuals	
A-05-J	Create positions to employ low-income individuals	Total number of part-time positions created for low-income individuals	
A-06-J	Create positions to employ low-income individuals	Total # of full-time positions created for low-income individuals	

Column 6: Actual to Date
Positions with Benefits

A-06-J: Total FT positions created

| A-09-J health care benefits | A-10-J paid sick leave | A-11-J retirement benefits | A-12-J profit sharing |

Column 6: Actual to Date
Employees

Indicator Number	Objective / Goal	Indicator	Actual to Date
A-13-E	Prepare low-income individuals for employment	Total # of low-income individuals trained in skills for the jobs created	
A-14-E		# of those low-income individuals trained who were TANF recipients	
A-15-E		# of low-income individuals who received a certification for a full-time position created	

Column 6: Actual to Date
Employees

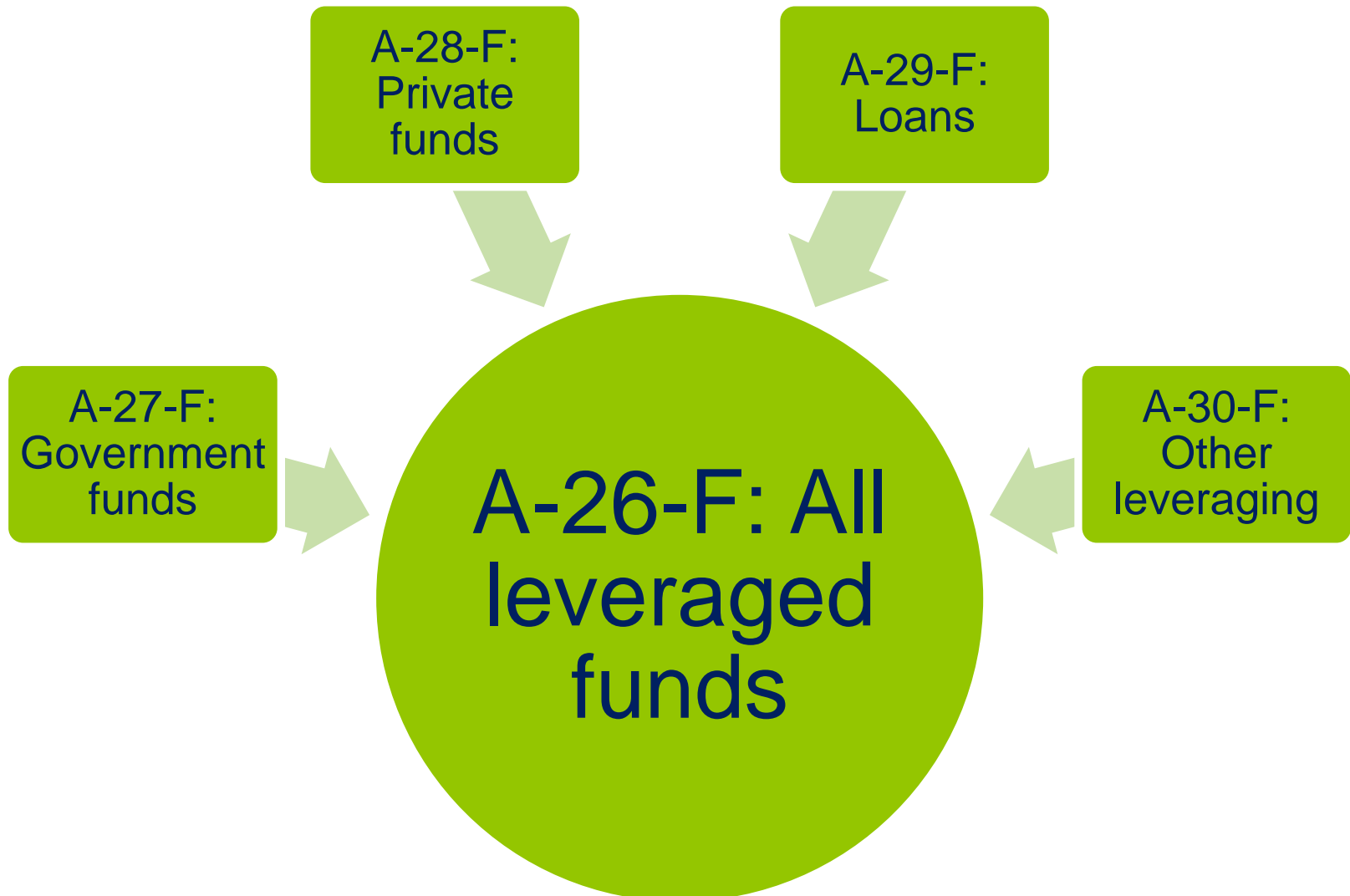| Indicator Number	Objective / Goal	Indicator	Actual to Date
A-16-E	Employ low-income individuals in positions created	Total # of low-income individuals, including TANF recipients, employed in the full-time positions created	
A-17-E		# of those low-income individuals employed who were TANF recipients	
A-18-E	Create full-time positions with opportunity for advancement	Average STARTING wage of all low-income individuals, including TANF recipients, placed in full-time positions created	
A-19-E		Average STARTING wage of TANF recipients placed in full-time positions created	
A-20-E		# of individuals in full-time positions created who received job promotions	
A-21-E		# of individuals in full-time positions created who received pay raises	

Column 6: Actual to Date
Funding (Leveraging)

Indicator Number	Objective / Goal	Indicator	Actual to Date
A-26-F	Leverage additional funds to increase project success	How many total dollars has your project leveraged?	🔒
A-27-F		How many dollars has your project leveraged from government funds?	
A-28-F		How many dollars has your project leveraged from the private sector?	
A-29-F		How many dollars has your project leveraged from loans?	
A-30-F		How many dollars has your project leveraged from other sources?	

Column 6: Actual to Date
Leveraging

A-28-F: Private funds

A-29-F: Loans

A-27-F: Government funds

A-26-F: All leveraged funds

A-30-F: Other leveraging

Column 6: Actual to Date
Business and Position Longevity Measures

Indicator Number	Objective / Goal	Indicator	Actual to Date
A-02-B	Create new businesses to employ low-income individuals	Total # of new businesses that were created AT LEAST 12 months ago	
A-03-B		# of new businesses created at least 12 months ago that have been or were operational in the community for AT LEAST 12 consecutive months	
A-07-J	Create positions to employ low-income individuals	# of those full-time positions that were created for low-income individuals AT LEAST six months ago	
A-08-J		# of full-time positions created for low-income individuals that have been or were operational in the community for AT LEAST six consecutive months	

Column 6: Actual to Date
Business Longevity Measures

A-01-B
All businesses ever created

A-02-B
All businesses created AT LEAST 12 months ago

A-03-B
Businesses that lasted AT LEAST 12 mos

Column 6: Actual to Date
Position Longevity Measures

A-06-J
Total # of full-time positions ever created for low-income individuals

A-07-J
# of full-time positions created for low-income individuals AT LEAST six months ago

A-08-J
# of full-time positions created for low-income individuals that lasted AT LEAST 6 mos

Column 6: Actual to Date
Employee Longevity Measures

Indicator Number	Objective / Goal	Indicator	Actual to Date
A-22-E	Help low-income individuals retain new jobs	Total # of low-income individuals who were hired into a CED-created full-time position AT LEAST six months ago	
A-23-E		Total # of low-income individuals who retained their full-time jobs for AT LEAST six consecutive months	
A-24-E		# of TANF recipients who were hired into a CED-created full-time position AT LEAST six months ago	
A-25-E		# of TANF recipients who retained their full-time jobs for AT LEAST six consecutive months	

Column 6: Actual to Date
Employee Retention

A-16-E: All low-income individuals ever hired

- Includes **A-17-E:** All TANF recipients ever hired

A-22-E: Low-income individuals hired 6+ mos ago

- Includes **A-24-E:** TANF recipients hired 6+ months ago

A-23-E: Low-income individuals retain job 6+ mos

- Includes **A-25-E:** TANF recipients retain jobs 6+ months

Column 7: Explanation

- For all questions you answered zero, you must enter *one* of the following:

  - **"NA" for not applicable** – this indicator is not relevant to your program;

  - **"DNA" for data not available –** the indicator is relevant, but you do not have this information; *or*

  - A short explanation of why your program currently has zero for indicators that are applicable and you track, but are just at zero. For example, "No jobs were created because construction hasn't been completed yet."

- Also include a brief explanation to describe the data you entered in Actual to Date for ALL indicators.

Form B:
QUALITATIVE MEASURES

Form B: Columns

Appendix C: Performance Progress Report Form PROGRAM INDICATOR SF-PPR FORM B				
1. Federal Agency and Organization Element to Which Report is Submitted Office of Community Services	**2. Federal Grant or Other Identifying Number Assigned by Federal Agency** 90E		**3a. DUNS -** **3b. EIN**	**4. Reporting Period End Date** 09/30/2005
B. Program Indicators				
(1) Activity Number or Label	**(2) Activity Description**	**(3)**	**(4) Explanation**	
Project Description				
*A-01	Project Strategy		**Not cumulative!**	

Reference:

1. Activity Number
2. Activity Description

Ignore:

3. Blank!

Complete:

4. Explanation

Form B: Parts A-D

- Part A: Project Information (A-01 through A-09)
  - Required fields
  - Complete only in first report, prepopulated in subsequent

- Part B: Highlights & Major Accomplishments
  - Broken into 13 different indicators

- Part C: Challenges & Resolutions
  - Broken into same 13 indicators as Part B

- Part D: Changes (D-01 through D-11)
  - E.g., planned services, planned timeline, budget, etc.

Form E:

ACTIVITY-BASED EXPENDITURES

Activity-Based Expenditures

Appendix C: **Performance Progress Report Form**
ACTIVITY BASED EXPENDITURES SF-PPR-E

1. Federal Agency and Organization Element to Which Report is Submitted Office of Community Services	2. Federal Grant or Other Identifying Number Assigned by Federal Agency 90E(	3a. DUNS - 3b. EIN	4. Reporting Period End Date 09/30/2005

E. Activity Based Expenditures

(1) Activity Number or Label	(2) Activity Description	(3) Total Estimated Expenditures	(4) Funding Expended	Delete
E- 1		$0	$0	☐
Total:		$0	$0	

Add E. Activity Based Expenditures: 1 ▾ **Add** **Delete Marked Rows**

Reference:

1. Activity number or label

Complete:

2. Activity description

3. Total estimated expenditures

4. Funding expended

More information:

SUPPORT AND RESOURCES

Resources and Technical Assistance

- Conference Flash Drive

- Ongoing support through OCSRegistrar@icf.com

- PPR Information Page: http://www.acf.hhs.gov/programs/ocs/resource/ced-ppr-information-page

Questions

- Questions not answered today can be sent to OCSRegistrar@icf.com

- Hold questions about accessing the On-line Data Collection System (OLDC) until this afternoon's session.

- Ask specific questions at tomorrow's breakout session, Making Sense of Your PPR.